



Technical Assistance Grants (TAG): How to Find, Choose and Hire a Technical Advisor

Office of Emergency and Remedial Response
Community Involvement and Outreach Center

Quick Reference Fact Sheet

The Superfund Technical Assistance Grant (TAG) Program was created to provide grants to eligible groups of citizens living near Superfund sites for the purpose of hiring independent technical advisors. The technical advisor can interpret site-related information that citizens' groups can share with the entire community. TAG recipients help communities become more active participants in the Superfund process. This fact sheet provides an outline of some of the questions often asked by TAG recipients about finding and choosing a technical advisor.

What can a technical advisor do for my TAG group?

Your group determines the role of the technical advisor based on your community's needs and concerns. Possible activities include:

- Reviewing and interpreting site-related documents and data.
- Meeting with your group to explain technical information about the site.
- Participating in public meetings to help clarify site information.
- Assisting your group in communicating your concerns and preferences to EPA, state agencies and polluting parties.
- Participating in site visits to gain a better understanding of cleanup activities.
- Attending meetings and hearings directly related to site conditions.
- Participating in health and safety training.

Grant funds may **not** be used to finance litigation or underwrite

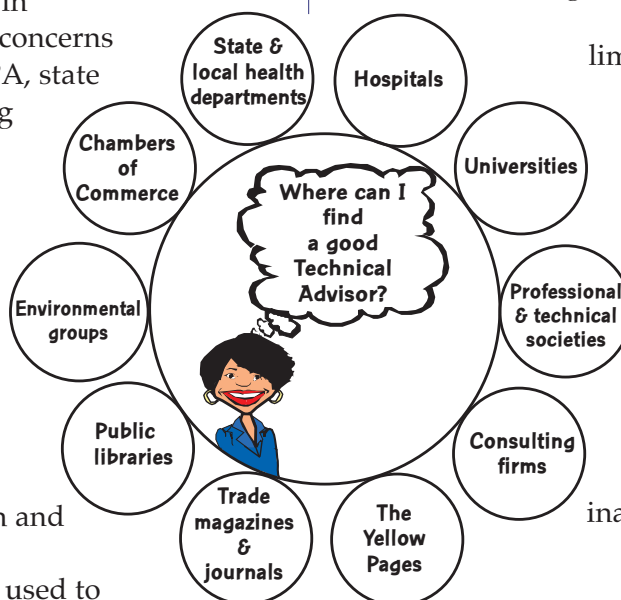
legal actions, such as paying attorneys or technical advisors to participate in any legal action or proceeding regarding or affecting the site.

Who are potential technical advisors?

Your group should choose a technical advisor who will provide you with an unbiased, independent review of site-related information. Potential advisors may be experts in chemistry, engineering, toxicology, epidemiology, hydrology, soil science, limnology or meteorology.

Your group selects the technical advisor whose expertise best suits the needs of your community.

Advisors should be qualified in disciplines related to the type of contamination at your site. For example, at a site with water contamination, a technical advisor with experience in hydrology or limnology would be appropriate.



What qualifications should I look for in a technical advisor?

The technical advisor should have the following qualifications:

- A demonstrated knowledge of hazardous or toxic waste issues.
- Academic training in a field relevant to your group's interests.
- The ability to translate technical information into plain English.
- A satisfactory performance record.
- A state license in his or her field.
- Not debarred or suspended as a federal contractor.
- Adequate accounting or auditing procedures to control funds.
- A willingness to comply with civil rights and equal opportunity law.

What is the process for hiring a technical advisor?

You must use the **competitive** selection method unless there is only one qualified candidate. If only one qualified candidate can be located, you can use the **non-competitive** procurement method. Also, the competitive selection procedures vary depending on the dollar value of your purchase or contract. The basic differences in the requirements of the two methods are outlined in the table below and discussed in more detail on the following pages. Your TAG Coordinator can provide you with the booklet entitled *Superfund Technical Assistance Grant (TAG) Handbook: Procurement—Using TAG Funds*, which explains the process further.

SUMMARY OF REQUIREMENTS FOR THE TWO PROCUREMENT METHODS

<p>THE COMPETITIVE SELECTION METHOD (Used when two or more qualified candidates exist)</p> <ul style="list-style-type: none">• For purchases or contracts over \$25,000 but less than \$50,000: solicit <i>written</i> proposals from <i>three or more</i> qualified sources.• For purchases or contracts over \$1,000 and up to \$25,000: solicit <i>oral</i> quotes from <i>two or more</i> qualified sources.• For purchases or contracts of \$1,000 or less: simply <i>discuss</i> your needs with a qualified candidate; no oral or written quotes are necessary.	See page 3 for details
<p>THE NON-COMPETITIVE PROCUREMENT METHOD (Used when only one qualified candidate exists)</p> <ul style="list-style-type: none">• Obtain written authority from the EPA award official.• For purchases or contracts less than \$50,000: ask the candidate for an <i>oral or written</i> quote.	See page 4 for details

THE COMPETITIVE SELECTION METHOD

Use this method when there are two or more qualified candidates from which to choose. The competitive selection method varies depending on the dollar value of your group's purchase or contract as described in the three boxes on this page.

For purchases or contracts over \$25,000 but less than \$50,000

Example: You need the services of a technical advisor or environmental consulting firm with expertise in hydrogeology, engineering, chemistry, the health sciences, and toxicology to review technical documents generated by the cleanup process at your site; attend meetings; prepare summary memos and reports; review your group's written comments to be submitted during the public comment period; and make presentations to group members and others.

1. Identify your needs.
2. Solicit **written proposals** from **three or more** qualified sources.
3. Evaluate all proposals.
4. Check with your Regional TAG Coordinator to be sure the candidates are not on the master list of suspended or debarred contractors.
5. Prepare the contract.
6. Provide EPA an opportunity to review your selection process and the contract.
7. Have the technical advisor complete a Certification Regarding Debarment, Suspension, and Other Responsibility Matters (EPA Form 5700-49).
8. Sign the contract.

For purchases or contracts over \$1,000 but less than \$25,000

Example: The environmental consulting firm you hired has the hydrogeologists, engineers, and chemists you need at your site. However, the firm does not offer expertise in the health sciences or toxicology, and you now need to have the risk assessment from the site reviewed. You want to hire a toxicologist for the sole task of reviewing the risk assessment.

1. Identify your needs.
2. Solicit **oral quotes** from **two or more** qualified sources.
3. Evaluate all quotes.
4. Check with your Regional TAG Coordinator to be sure the candidates are not on the master list of suspended or debarred contractors.
5. Prepare the contract.
6. Provide EPA an opportunity to review your selection process and the contract.
7. Sign the contract.

For purchases or contracts of \$1,000 or less

Example: Your group has prepared a newsletter and needs to hire a print shop to design and reproduce copies.

1. Identify your needs.
2. Identify potential technical advisors.
3. Discuss your needs with candidates.
4. Discuss with the candidates any potential conflicts of interest.
5. Check with your Regional TAG Coordinator to be sure candidates are not on the master list of suspended or debarred contractors.
6. Determine that the proposed costs are reasonable.
7. Negotiate with the candidates, if you wish, and select the best one.
8. Document, in 200 words or less, your reasons for selecting one candidate over the rest.

THE NON-COMPETITIVE SELECTION METHOD

Use this method when only one qualified candidate exists.
The requirements are described below.

For purchases or contracts of \$50,000 or less

Example: You needed to hire a technical advisor, so you began by locating possible sources of technical advisors with the skills you need. You checked universities, professional societies, and small, minority-owned, and women-owned businesses but were able to locate only one qualified candidate.

1. Identify your needs.
2. Contact your Regional TAG Coordinator to discuss the possibility of using this method.
3. Obtain written authority from the award official.
4. Discuss with the potential contractor the kinds of services you need and EPA's requirements.
5. Ask the candidate to give you an oral or written quote for performing the services.
6. Discuss with the candidate any potential conflicts of interest.
7. Check with your Regional TAG Coordinator to be sure the candidate is not on the master list of suspended or debarred contractors.
8. Negotiate with the candidate as necessary.
9. Document for the files why the proposed costs are acceptable.
10. Prepare the contract.
11. Provide EPA an opportunity to review your selection process and the contract.
12. Have the technical advisor complete a Certification Regarding Debarment, Suspension, and Other Responsibility Matters (EPA Form 5700-49) if the contract or purchase is for \$25,000 or more.
13. Sign the contract.

Helpful Tips on Hiring a Technical Advisor

- Start the process of locating a technical advisor early—it may take some time.
- Make positive efforts to seek out small, female, and minority-owned businesses.
- Maintain records of your group's selection activities.
- Contact your Regional TAG Coordinator if you have any questions.

The RCRA, Superfund, and Underground Storage Tank Hotline

This toll-free hotline is a source of further information on the TAG Program

- If calling from outside the Washington, DC area: **800-424-9346**
- If calling from within the Washington, DC area: **703-412-9810**
- For the hearing impaired: **TDD 800-553-7672**